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NPIC/TSSG/RED-1852-69
6 October 1969

MEMORANDUM FOR: RED Project Officers

SUBJECT   : New Reporting Procedures

1. The Project Control Boards are designed to assist management by graphically displaying the status of all active RED contracts. A quick glance at the boards will pinpoint any problem areas in the technical progress, scheduling or spending on a project. Through use of these boards, RED management as well as other center managers will be kept up to date on the status of the R&D program.

2. It will be the responsibility of the individual project monitors to be sure that the boards reflect the current status of their projects. The monitors will update the control boards monthly and any time during the month when the status of a project changes. In addition, the project monitors will fill out or update a new form, the R&D Project Status Report, on a monthly basis. These reports will be turned into the division secretary at the end of each month. Attached are instructions for maintaining the Project Control Boards and filling out the R&D Project Status Report.

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Chief, Research & Engineering Division,
TSSG

**Declass Review by
NIMA/DOD**

Instructions for Project Control Boards

        Within the month, new Project Control Boards will be delivered to
RED and mounted in the conference room. Each Project Control Board
will have active RED contracts listed alphabetically in the left
column To the right of each project name will be five rows labeled
T for Technical Status, S for Schedule Status, C for Cost Status, R
for Review meeting, and blank. Vertical lines will designate time
divisions by months and by years. Magnetic symbols will be placed
in the proper "Month" Column, each month to show the technical, cost
and time schedule status for each project.

        In addition, symbols will be placed in the "Review" row when con-
tract reviews take place. The symbols used will be either: (1) green--
depicting the status when it is proceeding according to the original
or officially revised plan; (2) yellow--warning of a potentially out
of control condition, such as higher than expected spending rates,
unanticipated delays, technical problems; and (3) red--signaling an
out of control situation such as an overrun situation, postponed
delivery date, or inability to solve a technical problem under con-
tract.

        Small write-on magnetic strips can be used to clarify an unusual
status by writing a cryptic note on the strip and placing it in the
proper month column in the blank row after the subject. The Project
Control Boards will serve as a communication link between the project
officers and RED management. It is therefore important that the Boards
be kept up to date and that the status symbols reflect the true status
of the project. Each project officer will be held accountable for his
individual projects.

Instructions for R&D Project Status Report

        A Project Status Report will be filled out by the project monitor
for each active contract the monitor controls. After initially filling
the report, the monitor will only have to update the date, the current
program value, the Essential Elements of Information, the cumulative
graph of expended funds, the milestone chart, the review dates, and the
Program Highlights. The reports will be kept in a notebook by the
division secretary for quick reference by the project officers or
center managers. The following is a description of the information
required under the headings.

        Title - The Project Name followed by the Project Number

        MO/YR - Month which report covers

        Contractor - self explanatory

Description - self explanatory

Contract No. - self explanatory

Contract Type - self explanatory

Program Value - Original Fixed Price or Ceiling Price or Target
    Price (also denote which) and Current Price and Fiscal Year
    of Original funding.

Meeting Performance Requirements - self explanatory

On Schedule - self explanatory

Within Contractual Costs - self explanatory

Overrun - Each Overrun should be listed separately.

Scope changes - Each change of scope should be listed separately.
    Include the fiscal year of the scope funding (a description of
    the change should also be noted in the highlights).

Agency Association - the classification of the contracts association
    with the Agency.

Title - the classification of the title

Work - the classification of the work

Expended and Committed Funds - This chart is to be scaled appropriately
    and the anticipated cumulative expenditures of the contractor are
    to be shown with a dotted line (i.e. the first month listed would
    be the first month of the contract and the cumulative expenditures
    at the beginning of that month would be zero, the last month
    listed would be the last month of the contract and the expended
    funds would be the ceiling or target contract cost.) The actual
    cumulative costs of the contract are to be shown with a solid line,
    (the end of the line will show expenditures to date). Each month
    this line will be extended one block. For fixed price contracts
    with no financial reporting requirements, this chart need not
    be filled out.

Key Personnel - the key personnel are to be listed as specified
    along with their phone numbers.

Contract Start - self explanatory

Contract Complete - self explanatory

Last Review - self explanatory

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Next Review - self explanatory

Milestones - The project should be broken down with the essential tasks listed directly under the "milestones" heading. To the right of each task, the projected phasing of that task should be shown with a dotted line extending through the appropriate month columns. Milestones, such as the start and end date of the task, should be shown with the outline of a triangle. As the contract proceeds, solid lines will be drawn to show the actual phasing of the tasks and solid triangles in the appropriate month column will show when the milestones have been reached. If delivery is required, such as a report or proto-type, the milestone triangle is circled when delivery is accomplished.

Program Highlights - This section is to be used for noting signi-ficant events such as technical problems, delivery dates of equipment, change-in-scopes, etc.

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